

OFFICIAL VISITOR/CONSULTANT CHECKLIST

Date of Event: _____ Host(s): _____
Logistics Coord: _____ DVO P.O.C. _____
Date/Time of Event(s): _____ Event(s) Location: _____

Preliminary Planning (Step 1) – 8 Weeks Prior to Visit

- _____ Determine purpose of visit (pg. 1) **(Working Group responsibility)**
- _____ DVO Approval (pg. 1) **(Working Group responsibility)**
- _____ Identify host (pg. 3) **(Working Group responsibility)**
- _____ Identify P.O.C. (liaison) at visitor's business office (pg. 5) **(Working Group responsibility)**
- _____ Request bio/photograph from visitor – electronic if possible (pg. 5 & example) **(Working Group Responsibility)**
- _____ Check Diversity calendar for scheduled events at:
(<http://www.lanl.gov/orgs/dvo/DAABPlanningCalendar>)
- _____ Confirm dates/times of presentations(s) with host(s) and visitor (pg. 5) **(Working Group responsibility)**
- _____ Get approval from visitor to videotape presentation (if applicable) (pg. 5) **(Working Group responsibility)**
- _____ Schedule time for conference call with visitor/consultant (pg. 6) **(Working Group responsibility)**
- _____ Identify Speaker Category – Official Visitor (Federal Employee?)/Consultant
- _____ Process Official Visitor (OV)/Purchase Request (P.R.) paperwork (pgs. 7 & 10) Process ES&H Form if applicable (pg. 12) Process Pre-Procurement Fact Sheet if applicable (pg. 9) **(DVO responsibility)**
- _____ Schedule meeting facility(s) **(Working Group responsibility)** – prepare paperwork if applicable – request Check? (pg. 15) **(DVO responsibility)**
- _____ Process Badge/Escort Form #1812, if presentation is being held in secure area (pg. 16) **(DVO responsibility)**
- _____ Coordinate with IM-4 - equipment needs (microphones, videotaping, etc) (pg. 17) **(Working Group & DVO responsibility)**

Preliminary Planning (Step 2) – 6 Weeks Prior-to-Visit

- _____ Identify individual who will do introduction of Visitor/Consultant - day-of-visit (pg. 19) (**Working Group responsibility**)
- _____ Contact DVO and request marketing assistance (if applicable) (pg. 19) (**Working Group responsibility**)
- _____ Send out itinerary to individuals or groups who have additional meetings with Visitor/Consultant (see example) (**Working Group & DVO responsibility**)

Preliminary Planning (Step 3) – 3 Weeks Prior-to-Visit

- _____ Provide Visitor/Consultant with information (maps, hotel information, etc –) (if applicable) (pg. 21) (**Working Group responsibility**)
- _____ Provide Visitor/Consultant with information on audience and expected outcome of presentation (pg. 21 & example) (**Working Group & DVO responsibility**)
- _____ Ask visitor to provide evaluation forms for their presentation (if applicable), DVO will also provide (pg. 22) (**DVO responsibility**)

Preliminary Planning (Step 4) – 2 Weeks Prior-to-Visit

- _____ Schedule working lunches, refreshments (if applicable) (pg. 23) (**Working Group & DVO responsibility**)
- _____ Identify caterer or restaurant providing services and plan accordingly (if applicable) (pgs. 23-25) (**Working Group & DVO responsibility**)

Preliminary Planning (Step 5) – 1–2 Weeks Prior-to-Visit

- _____ Provide visitor information to Public Affairs to publicize event on Newsbulletin (pg. 27) (**Working Group responsibility**)
- _____ Send LANL-ALL message and announce visit (if applicable) (pg. 29) (**DVO responsibility**)

Preliminary Planning (Step 6) – 1-2 Weeks Prior-to-Visit

- _____ Call BUS and reconfirm that visitor check will be ready for pick-up day prior to visit (if applicable) (pg. 30) (**Working Group & DVO responsibility**)

Preliminary Planning (Step 7) – Day Before Event)

- _____ Reconfirm who will be doing introduction of visitor (pg. 32) (**Working Group responsibility**)
- _____ Reconfirm working lunches, restaurant reservations, etc. (if applicable) (pg. 32) (**DVO responsibility**)
- _____ Pick-up check for visitor from BUS (if applicable) (pg. 32) (**Working Group responsibility**)

Day of Visit (Step 8)

- _____ Provide drink for visitor (during presentation) (pg. 34) (**Working Group & DVO responsibility**)
- _____ Hand deliver check to visitor (if applicable) (pg. 34) (**Working Group responsibility**)

Day after Visit (Step 9)

- _____ Follow-up with PA on publishing Newsbulletin article on event (pg. 36) (**Working Group responsibility**)
- _____ Follow-up with BUS on status of net 30 day rule for payment (if applicable) (pg. 36) (**DVO responsibility**)
- _____ Prepare thank you letter for speaker (pg. 36) (**Working Group & DVO responsibility**)
- _____ Check status of videotapes w/IM-4 (if applicable) (pg. 36) – When ready, send copy of videotape, thank you letter, newsbulletin articles to visitor (**DVO responsibility**)
- _____ Follow-up with Budget Analyst/DVO Chief of Staff/respective Working Group Chair, and report final costs of event (38) (**DVO responsibility**)